



Profiling Survey #1

Introduction

Please complete Profiling Survey #1 by July 14th. If you are part of a multi-branch library and your branches have different policies, please fill out a survey for each branch.

Name:

Email:

Library:



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Patron Statistical Codes

Patron Statistical Class Codes break down patron codes into smaller subsets for reporting purposes. Unlike patron codes, Statistical Class Codes do not affect circulation limits or fine calculations. They are used for reporting purposes only. Libraries are welcome to customize their list as needed. The values reflected in the spreadsheet were pulled from existing Sirsi policies and may be out of date.

Does the spreadsheet linked above accurately reflect the different subsets of your patron codes?

☐ My library's Statistical Class Codes listed in the document accurately reflect our cardholders.

☐ My library would like to change our statistical Class Codes. See below.

Statistical Class Code Changes:



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Patron Loan Limits

Please review the Patron Loan Limits document. This document lists fine thresholds, total checkouts allowed, total overdues allowed and total holds by patron code. If your library does not currently use the equivalent of a certain patron code, it is highlighted in blue. If you would like to begin using this patron code, please note the settings you would like to apply to that code in the comment box below.

Does the Patron Loan Limits document accurately reflect your library's fine thresholds, total checkouts, total overdues, and holds for each patron code?

- ☐ The Patron Loan Limits accurately reflect my library's thresholds and limits.
- ☐ My library has different limits and thresholds, and would like to make the changes listed below.

Changes:

Are there any patron codes that are exempt from being sent to collections?

- ☐ No, my library does not have any patron codes that are exempt from being sent to collections.
- ☐ Yes, my library does have certain patron codes that are exempt from being sent to collections.

Patron Codes:



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Patron Registration Options

To speed up processing when registering a new patron, Polaris allows libraries to set certain default values for new patron records. If you would like to set defaults for any of the following fields, please include them here. If you do not want to set a default, leave blank.

Add the following defaults:

Patron Code:

Statistical Class Code:

Expiration Term (example:
3 years):

Postal Code:

Area Code:

Notification Method (print,
email or text):



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Fine Exemptions

Are there any patron codes that are exempt from fines? Please check all that apply.

- ☐ Resident
- ☐ Nonresident
- ☐ Outreach
- ☐ Business
- ☐ School
- ☐ Teacher
- ☐ Student
- ☐ Reciprocal
- ☐ Courtesy
- ☐ Computer Use
- ☐ Online Registration
- ☐ Limited

Comments:



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Check-Out Charges

These settings apply only if your library charges patrons for checking out and/or renewing items of specified material types. You can also choose to waive the charge for certain patron codes.

If relevant, please list which material type(s) your library charges patrons for. For each, we need to know:

- **How much is the charge per item?**
- **Do you charge for renewal?**
- **Do you ONLY charge for renewal, and not the initial checkout?**
- **Are certain patron codes exempt from the charge?**

Does your library charge for checking out any material types?

- ☐ My Library does not charge for checking out any materials.
- ☐ Yes, my library does charge for certain materials. See below.

My library charges for:

| |
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| |
|--|



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Patron Self Registration

Polaris offers the option to turn-on self-registration from the PowerPAC. Patrons are able to register themselves for a library card, with special card restrictions that are set by the library.

If your library currently allows patron self-registration from the online catalog or your library would like to begin offering online self-registration, please provide the following information in the survey:

- **Number of overdues allowed**
- **Number of holds allowed**
- **Number of checkouts allowed**
- **Expiration period for the card**

Does your library offer or would like to offer self-registration in the public catalog?

- ☐ No, my library does not wish to offer self-registration at this time.
- ☐ Yes, my library does or would like to offer self-registration in the catalog once we are live on Polaris.

If yes, please define the following values:

| | |
|------------------------------|----------------------|
| Number of overdues allowed: | <input type="text"/> |
| Number of holds allowed: | <input type="text"/> |
| Number of checkouts allowed: | <input type="text"/> |
| Expiration period of card: | <input type="text"/> |



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Patron Record Updates

In PowerPAC, patrons are able to update certain information fields without staff intervention, such as notification preferences, email address, and phone number.

Are there any patron codes that are not allowed to update their own information in the PAC and must contact a staff member? Please check all that apply.

- ☐ Resident
- ☐ Nonresident
- ☐ Outreach
- ☐ Business
- ☐ School
- ☐ Teacher
- ☐ Student
- ☐ Reciprocal
- ☐ Courtesy
- ☐ Computer Use
- ☐ Online Registration
- ☐ Limited

Comments:

Would your library like to receive an email when a patron updates their information in the PAC? If so, please provide an email address below.



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Ask Us Option

If the Ask Us option is enabled in the PowerPAC, patrons can send suggestions, questions, and comments via email to the library.

Would your library like to enable the Ask Us option in the PowerPac?

- ☐ No, my library would not like to enable the Ask Us option in the PowerPac.
- ☐ Yes, my library would like to enable the Ask Us option in the PowerPac. The email address is listed below.

Email address to use:



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End of Term Due Dates

If your library issues teacher, school, or student cards, you are able to specify end-of-term due dates for those specific patron codes. If you choose to use end-of-term dates, item due dates will not go past these dates, even if the actual loan period is longer. For example, if your library issues teacher cards and you would like all materials checked out on these cards to be returned shortly after school lets out for the summer, your library can set an end-of-term date of June 15th.

Would your library like to apply end-of-term due dates for specific patron codes?

- ☐ No, my library would not like to apply end-of-term due dates at this time.
- ☐ Yes, my library would like to apply end-of term due dates. See below.

If applying end of term due dates, please fill out the options below.

End of term date
(00/00/0000):

Patron codes to apply
end-of-term date to:



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Interlibrary Loan Limits

Which patron codes are allowed to place interlibrary loans (outside of CCS)? Please check all that apply.

- ☐ Resident
- ☐ Nonresident
- ☐ Staff
- ☐ Outreach
- ☐ Business
- ☐ School
- ☐ Teacher
- ☐ Student
- ☐ Reciprocal
- ☐ Courtesy
- ☐ Online Registration

How many interlibrary loans are each patron code allowed to place? Please list.

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